

eCAF / ICS Transfers User Manual

Client	ICS Client Base
Date	January 2013
Version	1.0

Confidentiality / Document Control

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Document History

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Introduction

With the release of eCAF version 6, a new transfer process has been enabled to allow transfer to and from ICS. This document sets out to define this new process and describes what a site needs to do to enable the functionality.

This new process will not replace any sites existing transfer process. A customer using the old process of transferring cases between applications will need to make certain changes to enable the new functionality to take place.

Integration

Firstly a site needs to ensure they have the relevant integration versions installed, as otherwise this new process will not work and options will not be available.

Firstly the new functionality will only work on eCAF Application version 6 and above and ICS Application Version 7 and above. The following integration version then need to be installed:

eCAF

- eCAF Integration 6.0.1 (or higher)
- and ICS Integration version 6.0.13 (or higher)

ICS

- ICS Integration 7.0.4 (or higher)

If you do not have the correct integration versions installed please contact your Project Manager and request an upgrade to the relevant version.

The version information for each application can be easily identified by navigating to the *Version Information* found on the main menu.

ECAF Version Information				
Applications				
Protocol ECAF System v6.0.1HF1				
Version Information				
Version No	Patch	SQL Build	Installation Date	Comments
ICS 5.0.9	1		04-Jan-2013 09:39	
Installed Modules				
Module	Version			
Client Configuration	Doncaster 6.0.2			
ICS Integration	Liquidlogic 6.0.14			
ECAF Integration	eCAF 6.0.1			
Admin Tool	ICS Admin 3.7.14			
ECAF Admin Actions	ECAF Admin Actions 6.0.1			
My View	My View 6.0.0			

ICS Version Information				
Applications				
Protocol Childrens System v7.0				
Version Information				
Version No	Patch	SQL Build	Installation Date	Comments
ICS 7.0.1HF3	1	1	08-Jan-2013 13:37	
Installed Modules				
Module	Version			
Client Configuration	Doncaster 7.0.3			
Generic Configuration	Liquidlogic 7.0.0			
Integration	Liquidlogic 7.0.5			
Reports	7.0.2			
Admin Tool	ICS Admin 3.7.14			
ICS Admin Actions	ICS Admin Actions 7.0.2			
My View	My View 7.0.2			

Generic Configuration

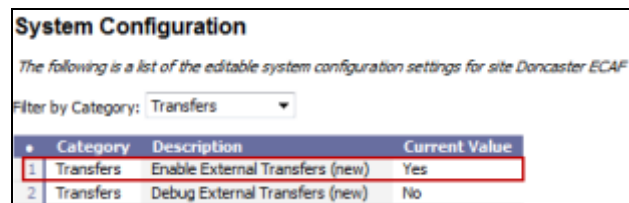
To enable the customer to set up the new transfer process Generic configuration version 7.0.2 will be needed. If a customer requires this process then please contact your Project Manager and request an upgrade to this configuration version.

Enabling the process in eCAF

There are a number of tasks a Systems Admin worker would need to undertake to enable the process within eCAF, and these are described below.

System Configuration Maintenance

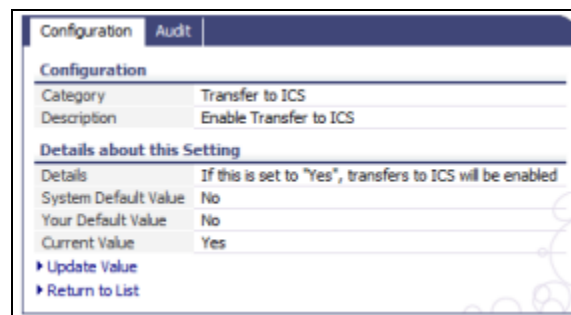
Within System Configuration Maintenance there is a category titled *Transfers*. Within this the site will need to set the *Enable External Transfers (new)* setting to Yes.



The screenshot shows the 'System Configuration' page for site 'Doncaster ECAF'. It features a 'Filter by Category' dropdown set to 'Transfers'. Below is a table with two rows. The first row, 'Enable External Transfers (new)', is highlighted with a red box and has a 'Current Value' of 'Yes'. The second row, 'Debug External Transfers (new)', has a 'Current Value' of 'No'.

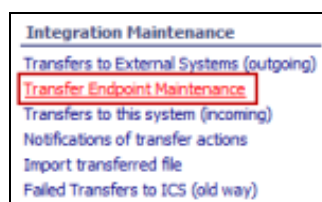
	Category	Description	Current Value
1	Transfers	Enable External Transfers (new)	Yes
2	Transfers	Debug External Transfers (new)	No

Customers enabling the Transfer to ICS process for the first time will also need to set the below System Configuration setting to Yes. Any site already using the Transfer to ICS process will not need to switch this on as it will already be set to Yes.



The screenshot shows the 'Configuration' tab for the 'Transfer to ICS' setting. It displays the description 'Enable Transfer to ICS'. Under 'Details about this Setting', it shows: Details: 'If this is set to "Yes", transfers to ICS will be enabled'; System Default Value: 'No'; Your Default Value: 'No'; Current Value: 'Yes'. There are links for 'Update Value' and 'Return to List'.

Transfer Endpoint Maintenance



The screenshot shows the 'Integration Maintenance' menu. The option 'Transfer Endpoint Maintenance' is highlighted with a red box. Other options include 'Transfers to External Systems (outgoing)', 'Transfers to this system (incoming)', 'Notifications of transfer actions', 'Import transferred file', and 'Failed Transfers to ICS (old way)'.

This maintenance option, accessed from the main menu, allows a customer to define the endpoint of the transfer. For customers using the transfer process already this will have entries within which show the existing endpoints.



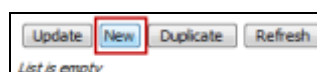
The screenshot shows the 'Transfer Endpoint Maintenance' interface with buttons for 'Update', 'New', 'Duplicate', 'Delete', and 'Refresh'. Below is a table with two entries. The first entry, 'ICSDoncasterIntTest', has an 'Expired?' status of 'No' and a URL of 'http://liquid-test3.liquidlogic.co.uk:15264'. The second entry, 'ICSDDev', has an 'Expired?' status of 'No' and a URL of 'http://liquid-test3.liquidlogic.co.uk:15263'.

ID	Description	Expired?	Application	URL
1	ICSDoncasterIntTest	No	ICS	http://liquid-test3.liquidlogic.co.uk:15264
2	ICSDDev	No	ICS	http://liquid-test3.liquidlogic.co.uk:15263

These can be overridden if required, and the same process should be undertaken as if creating a new Endpoint.

Creating a new Transfer Endpoint

To create a new Transfer Endpoint, navigate to the *Transfer Endpoint Maintenance* menu option and click on *New*.



The screenshot shows the 'Transfer Endpoint Maintenance' interface with buttons for 'Update', 'New', 'Duplicate', and 'Refresh'. The 'New' button is highlighted with a red box. Below the buttons, it says 'List is empty'.

The details should then be filled out, similar to below:

- **Application** - The application is a drop down and will provide the available applications to choose from. This will be the application the transfer is received in.
- **ID** – This can be a brief ID made up by the customer site
- **Description** – this should be the description of the receiving application
- **URL** – this should be the URL of the receiving system, up to an including the port number

Once these details have been added click *OK* and this will then return the user to the Endpoint Maintenance screen with the entry displayed in a list view.

Update New Duplicate Delete Refresh					
Query Results (3)					
ID	Description	Expired?	Application	URL	
ICS	ICS Doncaster 7	No	ICS	http://liquid-test3.liquidlogic.co.uk:15377	

This process is then completed.

Note: there should only ever be one active endpoint, if there are multiple active endpoints then the transfer will not occur as the application will not know which system to transfer to. If there are more than 1 entry, then the invalid entries should be expired.

Update New Duplicate Refresh					
Query Results (2)					
ID	Description	Expired?	Application	URL	
1 eCAF	eCAF Doncaster 6	Yes	ECAF	http://liquid-test3.liquidlogic.co.uk:15307	
2 eCAF	eCAF Doncaster Trunk	No	ECAF	http://liquid-test3.liquidlogic.co.uk:15051	

Adding the new Transfer Element to the form

Once the set up has been completed the Transfer to ICS form will need to be amended to add the new transfer element in place of the existing element.

Note: Customer forms may be named differently, and there may be multiple forms with this element in, so all forms will need amending when using the new transfer process. For the purpose of this document the form is called *Transfer to ICS*.

Access the Customer Form Repository

Firstly click on the *Customer Form Repository* link from the main menu.

When here, locate the relevant Transfer to ICS form(s) to be amended and select *Create a Customer Revision of this form*.

Customer Form Repository

Registered Protocol Environments:

	Description	Application	Version	Live/Test?	Status	Details
1	Doncaster 6	ECAF	6.0.1	Test	Connected	No Issues

[Register a new Protocol Environment](#)
[Refresh Server Statuses and Form Templates](#)

Customer Forms:

☒ Show Non-Customer Forms
 ☐ (Show Unused Form Types)
 ☐

	Form Streams
1	Action Meeting Notes
2	Action Meeting Outcomes
152	Temporary CP Transfer In Assessment
153	Transfer to ICS
154	Transfer to ICS

[Create a new Customer Form Type](#)

Remote Liquidlogic Form

Environment: **Doncaster 6 (6.0.1)**

Form: **Transfer to ICS v1 (2)**

Site(s): **Doncaster ECAF**

Status: **Remote Liquidlogic Form**

Form Designer

[Open in Form Designer](#)

New Revision

[Create a Customer Revision of this Form - v1.2](#)

[Mark this Form Revision \(for copying\)](#)

Amending the form using Form Designer

The new customer revision should be opened in Form Designer. When in the form the old transfer element will need to be deleted if it exists. However, it may not exist and therefore will not need to be deleted and therefore ignore this stage and progress to the stage below.

Transfer to ICS v1.1 (Form Designer) | Undo | Redo | Save | Export (xml) | Export (xchf) | Import | Close

WYSIWYG Editing Pane | Application | Briefcase | XML

Index

- Assessment Template
 - Form Type: ECAF/ETTransferToICS
 - Assessment Form: Transfer to ICS (ecafetform)
 - Heading: Transfer to ICS (TRANSFERICS)

Transfer to ICS
(Select forms and case notes to transfer to ICS when finalised, together with basic child demographics)

Transfer/Export to another System (Original Version)

Transfer Details

Date of transfer: 01-Mar-2012

Comments: This is the original transfer form

Cut
 Copy
 Duplicate
 Delete
 Add
 Disable IF

Selected Element Index

Transfer/Export to another System (Original Version)
IDTRANSFERTOICS

Attributes | Printing | Views

Element Identifiers

Control ID: IDTRANSFERTOICS

Element Details

Caption:
Extra Text:

Question Layout

Position: Default

The new transfer element will then need to be added to the form. This is found in Library under the *Transfer to ICS* title.

Errors (0) | Warnings (1) | Library | Search

Library

- Form Elements
 - Basic Elements
 - Transfer to ICS
 - New Transfer
 - Transfer/Export to another System (New Transfer Process) IDTRANSFERTOICS**
 - Original Transfer
 - ECAF Demographics
 - Standard Choices

This should be dragged to the relevant section of the form, or select *Copy*, and back in the form *Paste Into*. The element will then be displayed in the form as below.

The screenshot displays the 'Referral to ECAF' form template in the WYSIWYG Editing Pane. The form is titled 'Referral to ECAF' and includes a subtitle '(Select forms and case notes to transfer to ECAF when finalised, together with basic child demographics)'. The form is divided into several sections:

- Transfer Details:** Includes fields for 'Date of Transfer', 'Comments', and a checkbox for 'Are parents aware of this transfer?'.
- Forms to include in this transfer:** A section for selecting forms to transfer, with a list of available forms including 'Child Protection Review Conference Outcome (Monday, 1 August 2005)'.
- Case Notes to include in this transfer:** A section for selecting case notes to transfer, with a list of available case notes including 'Case Note for Griffin, Chris (13 years) , on 01-Dec-2012 , of type Email (In)'.
- Documents to include in this transfer:** A section for selecting documents to transfer, with a list of available documents including 'Document - Notification Letter to Birth Parents, 03-Dec-2012' and 'Document - Notification Letter to Prospective Adopters, 03-Dec-2012'.

The right sidebar contains a 'Selected Element Index' and an 'Attributes' panel. The 'Attributes' panel includes sections for 'Element Identifiers', 'Element Details', 'Heading Details', 'Heading State', and 'Element Help'.

Note: the preview of the element may differ per customer but it is the correct element.

Once all changes to the form have been made the form should then be saved and closed. This new form can then be released for Testing, approved and released into the relevant environments when ready.

For more information on using the Customer Form Repository and amending forms, please refer to the **Customer Form Repository User Guide** available on the WIKI.

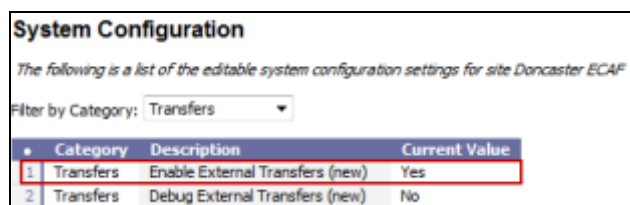
If a customer does not have the CFR installed in eCAF Liquidlogic are able to undertake this work for a charge. Please raise a JIRA UAT call specifying the requirements for this form.

Enabling the process in ICS

There are a number of tasks a Systems Admin worker would need to undertake to enable the process within ICS, and these are described below. This process is similar to that described above.

System Configuration Maintenance

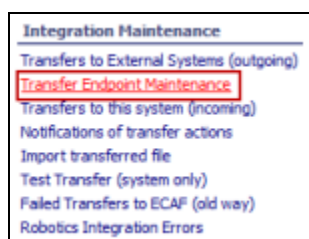
Within System Configuration Maintenance there is a category titled *Transfers*. Within this the site will need to set the *Enable External Transfers (new)* setting to Yes.



The screenshot shows the 'System Configuration' window for site Doncaster ECAF. It lists two settings under the 'Transfers' category: 'Enable External Transfers (new)' set to 'Yes' and 'Debug External Transfers (new)' set to 'No'. The first row is highlighted with a red box.

	Category	Description	Current Value
1	Transfers	Enable External Transfers (new)	Yes
2	Transfers	Debug External Transfers (new)	No

Transfer Endpoint Maintenance

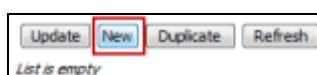


This maintenance option, accessed from the main menu, allows a customer to define the endpoint of the transfer. For customers using the transfer process already this will have entries within which show the existing endpoints.

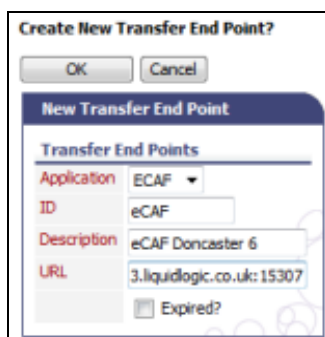
These can be overridden if required, and the same process should be undertaken as if creating a new Endpoint.

Creating a new Transfer Endpoint

To create a new Transfer Endpoint, navigate to the *Transfer Endpoint Maintenance* menu option and click on *New*.



The details should then be filled out, similar to below:



The screenshot shows the 'Create New Transfer End Point' dialog box. It contains fields for 'Application' (set to ECAF), 'ID' (eCAF), 'Description' (eCAF Doncaster 6), and 'URL' (3.liquidlogic.co.uk:15307). There is also an 'Expired?' checkbox.

- **Application** - The application is a drop down and will provide the available applications to choose from. This will be the application the transfer is received in.
- **ID** – This can be a brief ID made up by the customer site
- **Description** – this should be the description of the receiving application

- **URL** – this should be the URL of the receiving system, up to and including the port number

Once these details have been added click *OK* and this will then return the user to the Endpoint Maintenance screen with the entry displayed in a list view.

Update New Duplicate Refresh				
Query Results (1)				
ID	Description	Expired?	Application	URL
1	eCAF eCAF Doncaster 6	No	ECAF	http://liquid-test3.liquidlogic.co.uk:15307

This process is then completed.

Note: there should only ever be one active endpoint, if there are multiple active endpoints then the transfer will not occur as the application will not know which system to transfer to. If there are more than 1 entry, then the invalid entries should be expired.

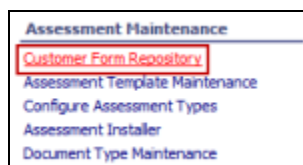
Adding the new Transfer Element to the form

Once the set up has been completed the Transfer to eCAF form will need to be amended to add the new transfer element in place of the existing element.

Note: Customer forms may be named differently, and there may be multiple forms with this element in, so all forms will need amending when using the new transfer process. For the purpose of this document the form is called *Transfer to eCAF*.

Access the Customer Form Repository

Firstly click on the *Customer Form Repository* link from the main menu.



When here, locate the relevant Referral to eCAF form(s) to be amended and select *Create a Customer Revision of this form*.

171	Placement Planning Meeting Minutes	Remote Liquidlogic Form
172	Pre CP Deregistration report	Environment Local System (8.0)
173	Private Fostering Arrangement Assessment Record	Form Referral to CAF v1 (1)
174	Private Fostering Arrangement Record (Visit Under Regulation 8)	Site(s) Liquidlogic Test
175	Prospective Adopters Report	Status Remote Liquidlogic Form
176	Record of Follow Up Strategy Discussion	Form Designer
177	Record of Outcome of 547 enquiries	Open in Form Designer
178	Record of Strategy Discussion	New Revision
179	Referral Form for Birth Relatives	Create a Customer Revision of this Form - v1.1
180	Referral Record	Mark this Form Revision (for copying)
181	Referral to ECAF	

Amending the form using Form Designer

The new customer revision should be opened in Form Designer. When in the form the old transfer element will need to be deleted if it exists. However, it may not exist and therefore will not need to be deleted and therefore ignore this stage and progress to the stage below.

The new transfer element will then need to be added to the form. This is found in Library under the *ICS Forms – Transfer Forms* headings.

This should be dragged to the relevant section of the form, or select *Copy*, and back in the form *Paste Into*. The element will then be displayed in the form as below.

Note: the preview of the element may differ per customer but it is the correct element.

Once all changes to the form have been made the form should then be saved and closed. This new form can then be released for Testing, approved and released into the relevant environments when ready.

For more information on using the Customer Form Repository and amending forms, please refer to the **Customer Form Repository User Guide** available on the WIKI.

If a customer does not have the CFR installed in ICS Liquidlogic are able to undertake this work for a charge. Please raise a JIRA UAT call specifying the requirements for this form.

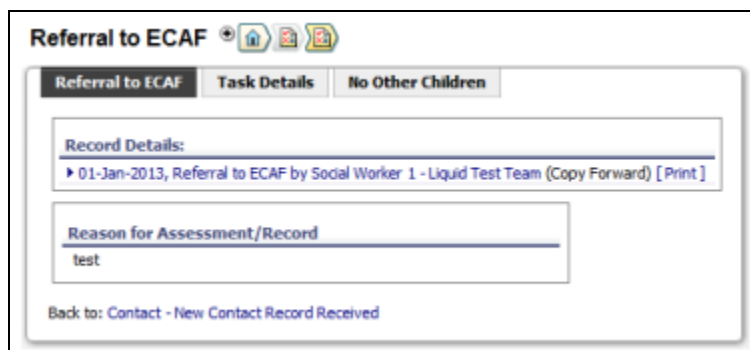
Completing a transfer

Transferring from ICS to eCAF

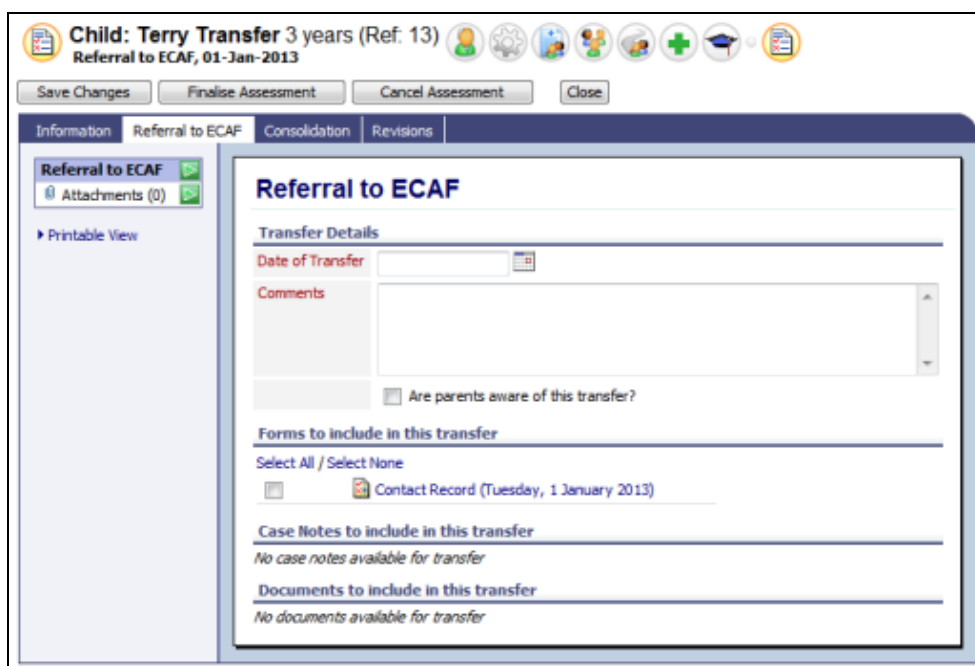
Starting the Transfer process in ICS

The transfer process in ICS can be started from many different locations, for example, as an outcome of the Contact Record. For more information about this please see the eCAF / ICS Transfer Configuration Document, where this can be specified.

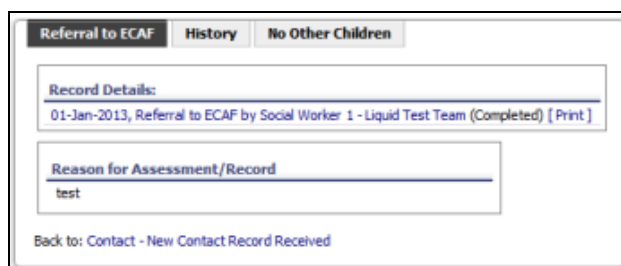
Once the decision to complete the transfer has been started the Transfer stage will become active with the transfer form available.



The form should then be opened and can be completed selecting the relevant forms, documents and case notes to also transfer.



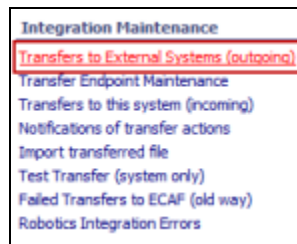
Once the form has been completed the Transfer will take place.



Transfer to External System menu option

The user will not see anything in the application to confirm the transfer has taken place. It is, however, possible for a user with an Admin profile to do this as outlined below.

Navigate to the *Transfers to External Systems (outgoing)* link on the main menu.



When here, the user is able to search for all transfers or a specific person. The list of results will be displayed in the search and within the table shows the status of the transfer.

Transfers to External Systems (outgoing)

QueryResults

Printable View

Query Results (1)

	To	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status	Reason For Failure
1	ECAF	9		13	Terry	Transfer	01-Jan-2010	Successful	

- Successful – this means the transfer has been successful and a task will now show in eCAF in the configured group tray.
- Pending – this means that the transfer has not yet been sent to eCAF. This will occur when looking at the transfer soon after it has been created, as a service is run at a set number of minutes. If, for any reason, a transfer had taken place 24 hours previously, but is still showing as pending this may be an issue with the systems and Liquidlogic should be contacted stating the time the transfer was started, and this will then be investigated.
- Failed – this will show if the transfer has failed for any reason. If it does fail it will provide a reason for failure. See section on Failed Transfers for more information.

Clicking on a result will bring up another screen showing the transfer in more detail, such as the person details as well as what forms were included in this transfer.

A screenshot of a web application showing the details of a transfer to eCAF. The screen is titled 'Transfer to eCAF'. It has sections for 'Transfer Status', 'Person Details', 'Transfer Details', and 'Forms included in this transfer'. The 'Transfer Status' section shows 'Transfer ID: 9' and 'Status: Successful'. The 'Person Details' section shows 'Forename: Terry', 'Surname: Transfer', and 'Date of Birth: 01-Jan-2010'. The 'Transfer Details' section shows 'Destination System: ECAF', 'Transfer Date: 13', 'Are the parents aware of this transfer?: No', 'Comments: ', and 'Recipients: '. The 'Forms included in this transfer' section shows a list of forms, including 'Referral to ECAF (Tuesday, 1 January 2013)'. There are also links for 'Resubmit all failed transfers', 'Back to List of transfers', and 'Open Person Record'.

Transfer Status	
Transfer ID	9
Status	Successful

Person Details	
Forename	Terry
Surname	Transfer
Date of Birth	01-Jan-2010

Transfer Details	
Destination System	ECAF
Transfer Date	13
Are the parents aware of this transfer?	No
Comments	
Recipients	

Forms included in this transfer

- Referral to ECAF (Tuesday, 1 January 2013)

Other Items (e.g. Case Notes) included in this transfer

- Open Person Record

Receiving the transfer in eCAF

When the transfer has been successful a transfer task will show in the receiving group tray as shown below.

The screenshot shows the eCAF Admin interface. At the top, there's a navigation bar with 'Workday (0)', 'My View', 'eCAF Admin (7)', and 'Show empty >'. Below this is a filter bar with 'Group By: Date | Task | Child | Address | Locality' and 'Order By: Start Date | Due Date | Timeframe | Person'. A table lists tasks, with one task highlighted: 'Transfer, Terry (3 years) (1)'. Below the table, a detailed view of the task is shown: 'Transfer from Doncaster HBC ICS - Please review this case transferred from Doncaster HBC ICS'. A 'Pickup' button is visible in the bottom right corner.

By default the group tray that the transfer tasks are sent to is set with the group ID of *ECAFADMIN*. If a site wishes to change this, it can be done as part of configuration when completing the configuration document. However, if a site wishes to just make a change to the receiving group tray then a JIRA UAT should be raised specifying the details.

Any user with access to this group will be able to pick up the Transfer task. When picked up the user will be presented with the below screen.

The screenshot shows the 'Transfer, Terry (3 years)' form. It is divided into two main sections: 'Person Details - Remote System' and 'Transfer Details'. The 'Person Details - Remote System' section includes fields for Forename (Terry), Surname (Transfer), Date of Birth (01-Jan-2010), Gender (Male), Address Line 1 (1), Address Line 2 (Spoon Street), Address Line 3 (Quahog), and Postcode (QUA HOG). The 'Transfer Details' section includes a warning icon and text: 'This transfer includes attached forms and/or objects. These will be copied to the identified person upon completion.' It also includes fields for Transfer ID (6), Transfer From (Doncaster HBC ICS), Transfer Date, Transfer Comments, and a checkbox for 'Are the parents aware of this transfer?'. Below this is a section for 'Professional requesting transfer' with fields for Case Transferred By (Social Worker 1), Position, Agency (Liquid Test Team), Address (Liquid Test Team), Telephone, and Email. At the bottom, there is an 'Available Actions' section with the text 'No further available actions' and a 'Transfer Completion' section with two options: 'Complete Transfer' and 'Complete Transfer (with requested actions)'.

Search for the child in eCAF

Click on the *Search / Create the Child's Record in local system* to search for the child in the system. This will then populate the search screen with details copied across from ICS.

The screenshot shows the 'Find Person in ECAF' search form. It has a 'Query' section with 'Search', 'Reset', and 'Create' buttons. Below this is a 'Person' section with fields for ID, NHS Number, Surname (Transfer), and Forename (Terry). There is a checkbox for 'Show My Involvements'. The 'Age / Date of Birth' section includes fields for Date of Birth (01-Jan-2010), Age, and Gender (Male). The 'Address' section includes fields for House No. or Name (1), Street (Spoon Street), Town (Quahog), and Post Code (QUA HOG).

If no results are displayed the completed fields should be reduced to complete a full search of the system, as for example, the client may exist but at a different address.

When it is confirmed that the person does not exist in the application the child should be created. When in the create screen the system will automatically populate the information possible, and if the address already exists in the application this will also be populated. However, if the address does not exist this will be shown, and the address will need to be created.

Completing the transfer

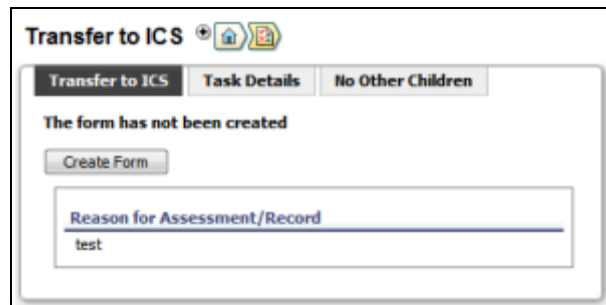
Once the child has been created the Transfer can be completed by clicking on the link shown below.

The Transfer is then complete and the child record exists in the eCAF application. The child can then be searched for and an episode started if this is what is required.

Transferring from eCAF to ICS

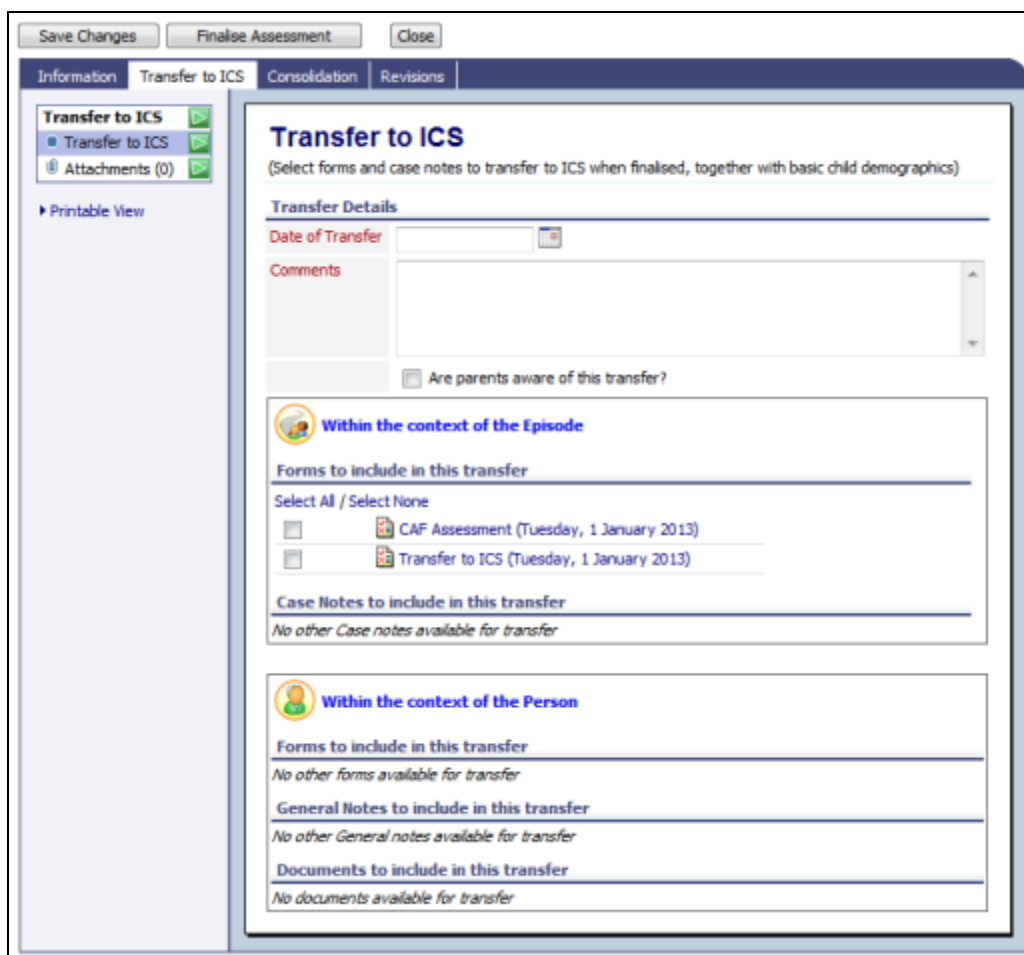
Starting the Transfer process in eCAF

The Transfer process in eCAF is usually started from within the workflow, however, it can also be started (if requested) from a standalone form or from within a workspace form.



The screenshot shows a web form titled "Transfer to ICS" with three tabs: "Transfer to ICS", "Task Details", and "No Other Children". The "Transfer to ICS" tab is active. The form contains the text "The form has not been created" and a "Create Form" button. Below this is a text input field labeled "Reason for Assessment/Record" with the value "test".

The form should then be opened and can be completed selecting the relevant information from eCAF to transfer across to ICS. The available information to transfer can be restricted. For further information on this please see the eCAF / ICS Transfers Configuration document.



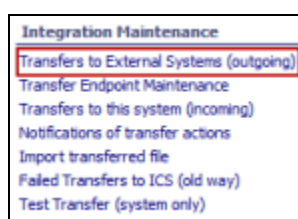
The screenshot shows a complex web form titled "Transfer to ICS" within a workflow interface. The form has a sidebar on the left with tabs: "Information", "Transfer to ICS", "Consolidation", and "Revisions". The "Transfer to ICS" tab is active. The main content area has a title "Transfer to ICS" and a subtitle "(Select forms and case notes to transfer to ICS when finalised, together with basic child demographics)". The form is divided into several sections: "Transfer Details" with fields for "Date of Transfer" and "Comments"; a checkbox "Are parents aware of this transfer?"; a section "Within the context of the Episode" with "Forms to include in this transfer" (listing "CAF Assessment (Tuesday, 1 January 2013)" and "Transfer to ICS (Tuesday, 1 January 2013)") and "Case Notes to include in this transfer" (showing "No other Case notes available for transfer"); and a section "Within the context of the Person" with "Forms to include in this transfer" (showing "No other forms available for transfer"), "General Notes to include in this transfer" (showing "No other General notes available for transfer"), and "Documents to include in this transfer" (showing "No documents available for transfer").

Once the form has been completed the Transfer will take place.

Transfer to External System menu option

The user will not see anything in the application to confirm the transfer has taken place. It is, however, possible for a user with an Admin profile to do this as outlined below.

Navigate to the *Transfers to External Systems (outgoing)* link on the main menu.



When here, the user is able to search for all transfers or a specific person. The list of results will be displayed in the search and within the table shows the status of the transfer.

Transfers to External Systems (outgoing)

Query Results

Printable View

Query Results (2)

	To	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status	Reason For Failure
2	ICS	4		5	Tiffany	Transfer	01-Jan-2013	Successful	

- Successful – this means the transfer has been successful and a task will now show in eCAF in the configured group tray.
- Pending – this means that the transfer has not yet been sent to eCAF. This will occur when looking at the transfer soon after it has been created, as a service is run at a set number of minutes. If, for any reason, a transfer had taken place 24 hours previously, but is still showing as pending this may be an issue with the systems and Liquidlogic should be contacted stating the time the transfer was started, and this will then be investigated.
- Failed – this will show if the transfer has failed for any reason. If it does fail it will provide a reason for failure. See section on Failed Transfers for more information.

Clicking on a result will bring up another screen showing the transfer in more detail, such as the person details as well as what forms were included in this transfer.

Refer to Social Care

Transfer Status

Transfer ID	4
Status	Successful

[▶ Resubmit all failed transfers](#)
[▶ Back to List of transfers](#)

Person Details

Forename	Tiffany
Surname	Transfer
Date of Birth	01-Jan-2013

Transfer Details

Destination System	ICS
Transfer Date	
Are the parents aware of this transfer?	No
Comments	
Recipients	

Forms included in this transfer

Transfer to ICS (Tuesday, 1 January 2013)

Other Items (e.g. Case Notes) included in this transfer

[▶ Open Person Record](#)
[▶ Open Related Episode](#)

Receiving the transfer in ICS

When the transfer has been successful a transfer task will show in the receiving group tray as shown below.

Worktray (29) | My View | Administration (12) | Team Manager 1 (13) | Show empty » | Configure

Group By: Date | **Task** | Person | Address | Referral Group | Order By: Start Date | **Due Date** | Timeframe | Person

Due Date	Person	Task Description	Expand All Collapse All
No Due Date	Transfer, Tiffany (2 weeks)	Transfer from Doncaster ECAF ECAF - Please review this case transferred from Doncaster ECAF ECAF	Pickup

By default the group tray that the transfer tasks are sent to is set with the group ID of *ADMIN*. If a site wishes to change this, it can be done as part of configuration when completing the configuration document. However, if a site wishes to just make a change to the receiving group tray then a JIRA UAT should be raised specifying the details.

Any user with access to this group will be able to pick up the Transfer task. When picked up the user will be presented with the below screen.

Transfer, Tiffany (2 weeks)

Person Details - ECAF		Transfer Details	
Forename	Tiffany	This CAF transfer includes attached forms and/or objects	
Surname	Transfer	Transfer Date	02-Jan-2013
DOB	01-Jan-2013	Transfer Comments	This case is transferring to ICS for further Social Care involvement
Gender	Female	Are the parents aware of this contact?	
House No or Name	23	Do you wish to remain anonymous?	
Street	Sty Street	Professional requesting transfer	
Town	Styville	Professional	Ecaf Worker 1
Postcode	ST7 8YE	Position	
Ethnicity		Agency	ECAF Liquid Test Team
Immigration Status		Address	ECAF Liquid Test Team
Religion		Telephone	
ICS Person		Email	
ICS Person	Not identified in ICS	Actions	
▶ Search / Create the Child's Record in ICS		You cannot create the contact until you have selected or created the ICS Person	

Search for the child in ICS

A matching process will then need to be undertaken to match the child to an existing record or to create a new record. Click on the *Search / Create the Child's Record in ICS* to search for the child in the system. This will then populate the search screen with details copied across from eCAF.

Find Person in ICS

Query

Search

Reset

Create

Query Types:

Basic

Default

Name

Surname

Transfer

Forename

Tiffany

☐ Include records that sound similar

References

System ID

NHS Number

Unique Pupil Number

Home Office Registration

National Insurance Number

YOT Number

Court Case Number

Age / Date of Birth

Date of Birth

01-Jan-2013

Age

Type

Gender

Female

Address

House No. or Name

23

Street

Sty Street

Town

Styville

Post Code

ST7 8YE

☒ Search Previous Addresses?

Child Protection Plan

Status

Start Date

End Date

Child Looked After

Status

CLA Start Date

CLA End Date

Referral

Status

Referral Start Date

Referral End Date

Involvements

Case Worker

<Click here to select a user>

Designated Manager

<Click here to select a user>

Case Worker's Team

<Click here to select a department>

Other Fields

Child In Need Code

Legal Status

If no results are displayed the completed fields should be reduced to complete a full search of the system, as for example, the client may exist but at a different address.

When it is confirmed that the person does not exist in the application the child should be created. When in the create screen the system will automatically populate the information possible, and if the address already exists in the application this will also be populated. However, if the address does not exist this will be shown, and the address will need to be created.

Query

Create

Create

Cancel

Personal Details

Additional

Identity

New Person

Personal Details

Case Number

Title

Surname

Transfer

Forename

Tiffany

Preferred Name

Gender

Female

Date of Birth & Age

Date of Birth / Expected DOB

01-Jan-2013

Approximate Age

Status Details

Education/Work Status

Marital Status

Deceased

Date of Death

Primary Address

No Address Matches - Please Lookup Address

Address

Lookup Address

Valid since

Secondary Address

Address

Lookup Address

Valid since

Current Address

Address

Lookup Address

Valid since

Completing the transfer

Once the child has been created the Transfer can be completed and a Contact Record started for the child.

Transfer, Tiffany (2 weeks)	
Person Details - ECAF	
Forename	Tiffany
Surname	Transfer
DOB	01-Jan-2013
Gender	Female
House No or Name	23
Street	Sty Street
Town	Styville
Postcode	ST7 8YE
Ethnicity	
Immigration Status	
Religion	
ICS Person	
ICS Person	Child: Tiffany Transfer
Find another ICS Person	
Transfer Details	
This CAF transfer includes attached forms and/or objects	
Transfer Date	02-Jan-2013
Transfer Comments	This case is transferring to ICS for further Social Care involvement
Are the parents aware of this contact?	
Do you wish to remain anonymous?	
Professional requesting transfer	
Professional	Ecaf Worker 1
Position	
Agency	ECAF Liquid Test Team
Address	ECAF Liquid Test Team
Telephone	
Email	
Actions	
Create new Contact	

The Transfer in ICS is then completed for this child and a Contact Record is started. This can be completed in the standard way.

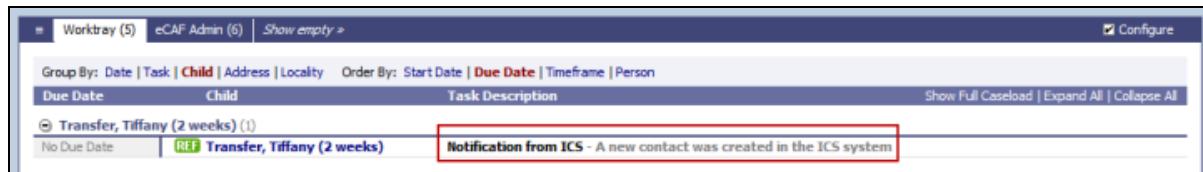
Contact Record

When the contact record is being completed after the transfer, dependant on a customer's fields, information is automatically populated into multiple fields to state it is a record from eCAF.

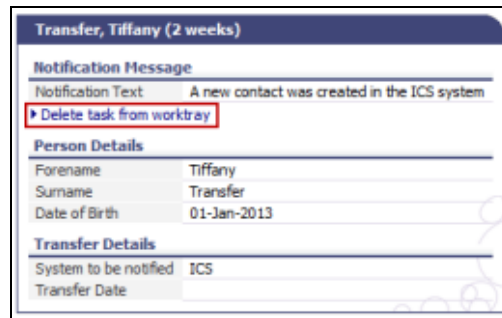
Save Changes Finalise Record Cancel Record Close	
Information Contact Record Consolidation Revisions	
Contact Record	
Printable View	
Details of person making contact	
Who has made contact?	Any other Professional
Complete the details of the External Agency or Professional	
Professional	Ecaf Worker 1
Position	
Agency	ECAF Liquid Test Team (ECAF System)
Address	ECAF Liquid Test Team
Telephone	
Does this person wish to remain anonymous?	<input type="radio"/> Yes <input type="radio"/> No
Method of Contact	
Time of Contact	<input type="radio"/> Normal working hours <input type="radio"/> Out of Hours - Evening <input type="radio"/> Out of Hours - Morning
Contact Method	
Reason for Contact	Notice of other agency contact with child/young person
Further Details	Transferred from ECAF system. ECAF Professional sent the following details: This case is transferring to ICS for further Social Care involvement.
Further Information	
Source Type	
Contact Outcome Code	
Contact Reason Code	
Further Action	
Suggested Outcomes	<input type="checkbox"/> Progress to Referral <input type="checkbox"/> No Further Action <input type="checkbox"/> Link to Existing Referral <input type="checkbox"/> Missing Child <input type="checkbox"/> Non-Agency Adoption—Ensure there is an Allocated Case Worker <input type="checkbox"/> Private Fostering Agreement <input type="checkbox"/> Enquiry of CP <input type="checkbox"/> OLA CP notification <input type="checkbox"/> Provision of Information/Advice <input type="checkbox"/> Referral to ECAF <input type="checkbox"/> Referral to Other Agency <input type="checkbox"/> TIE Application
Reasons for these Suggested Outcomes	
Contact Decision Date	

Notification of Contact started in ICS

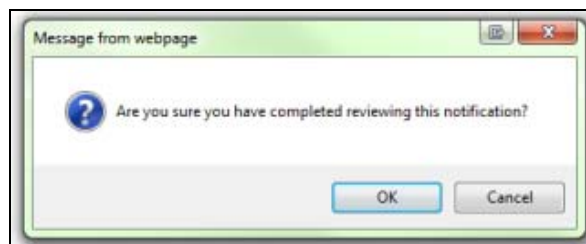
When an ICS contact is started on the child transferred to ICS, the system will automatically send a notification to the eCAF worker completing the transfer, which will appear as a task in their work tray.



Clicking on this task will bring up the following screen.



Once satisfied that no further work needs to be done, the *Delete Task* link as shown above should be clicked. The user will be provided with a confirmation message:



The task will be removed from the work tray and no further tasks will be automatically generated from either system and the transfer process is now completed.

Notification of Contact progressing to NFA in ICS

When the ICS user completes the Contact Record, if *No Further Action* is chosen as the outcome a notification is sent to the eCAF worker completing the process. This shows as a task in the eCAF users work tray.



Clicking on the task brings up the below screen where the task can be deleted from the worktray when necessary.



Failed Transfers

As stated earlier in this document, there may be occasions when a transfer fails between the 2 applications. These can be identified when searching in the *Transfers to External Systems (outgoing)* menu option. A user can complete a search for all transfers, specific transfers or just for transfers dependant on their status.

When in the results screen it is possible to see the transfer that failed, and the reason.

Query

Results

Printable View

Query Results (5)

	To	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status	Reason For Failure
1	ICS	3		2	JH	SDR-126160	01-Jan-2009	Successful	
2	ICS	4		5	Tiffany	Transfer	01-Jan-2013	Successful	
3	ICS	5		6	wanna	test	01-Jan-2013	Successful	
4	ICS	6		3	Transfer	Test	01-Jan-2011	Successful	
5	ICS	7		5	Tiffany	Transfer	01-Jan-2013	Failed	Unable to connect to configured endpoint http://liquid-test3.liquidlogic.co.uk:15377

Click into on the failed transfer and it will bring up further details regarding the transfer as well as available actions.

Refer to Social Care

Transfer Status

Transfer ID: 7

Status: Failed

Reason for Failure: Unable to connect to configured endpoint http://liquid-test3.liquidlogic.co.uk:15377

[▶ Resubmit this individual transfer](#)

[▶ Resubmit all failed transfers](#)

[▶ Back to List of transfers](#)

Person Details

Forename: Tiffany

Surname: Transfer

Date of Birth: 01-Jan-2013

Transfer Details

Destination System: ICS


Transfer Date:

Are the parents aware of this transfer?: No

Comments:

Recipients:

Forms included in this transfer

 Transfer to ICS (Wednesday, 2 January 2013)

Other Items (e.g. Case Notes) included in this transfer

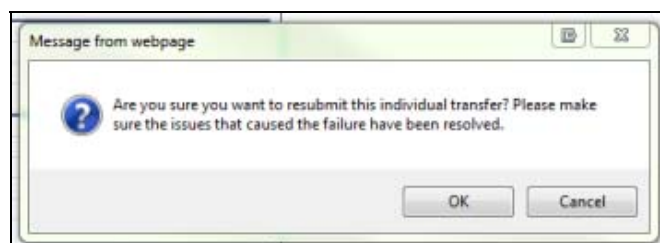
[▶ Open Person Record](#)

[▶ Open Related Episode](#)

It is then possible to resubmit this failed transfer, or all failed transfers.

Resubmitting Individual Transfers

Clicking on the link to resubmit the individual transfer will bring a pop up box to confirm you wish to progress with this. Click OK and the transfer will resend the next time the transfer service runs.

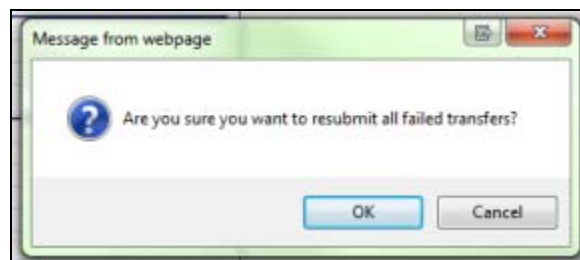


Whilst the transfer service is running the status will change to pending.

Refer to Social Care	
Transfer Status	
Transfer ID	7
Status	Pending
▶ Resubmit all failed transfers ▶ Back to List of transfers	
Person Details	
Forename	Tiffany
Surname	Transfer
Date of Birth	01-Jan-2013
Transfer Details	
Destination System	ICS
Transfer Date	
Are the parents aware of this transfer?	No
Comments	
Recipients	
Forms included in this transfer	
 Transfer to ICS (Wednesday, 2 January 2013)	
Other Items (e.g. Case Notes) included in this transfer	
▶ Open Person Record ▶ Open Related Episode	

Resubmitting All Transfers

Clicking the link to resubmit all transfers will, again, bring up a confirmation box. Click OK and the transfer will resend the next time the transfer service runs.



Whilst the transfer service is running the status will change to pending.

Failure Reasons

The transfer may fail for a number of reasons. Firstly ensure that all the configuration settings are correct as explained in this manual. Secondly ensure both services are running. The receiving application may not be running for a certain reason and this will cause a failure.

What to do if transfers continue to fail

When transfers fail, and they are resubmitted for transfer, if all the configuration is set up correctly, and the applications are running but failures are still occurring then Liquidlogic should be contacted who will be able to investigate the failure reason further. Liquidlogic would need to know the following:

- The application transferring from and to
- The case number of the case being transferred
- The date and time the transfer was sent from the application

Liquidlogic would need to dial in to the application and retrieve the log file to investigate why the transfer failed and fix the issue.